



**Indiana Pro Bono Commission**  
230 East Ohio Street, Suite 200  
Indianapolis, IN 46204

**Indiana Bar Foundation**  
230 East Ohio Street, Suite 200  
Indianapolis, IN 46204

## **COMBINED 2003 DISTRICT REPORT, 2005 PRO BONO GRANT APPLICATION, AND 2005 PLAN**

### **Pro Bono District 10**

**Applicant:** District 10 Pro Bono Project, Inc., by Diane J. Walker, Plan Administrator  
**Mailing Address:** P.O. Box 8382, Bloomington, IN 47407

**Phone:** (812)339-3610 **Fax:** (812)339-3629  
**E-mail address:** dist10probono@aol.com **Website address:** NA  
**Judicial Appointee:** Hon. Michael A. Robbins

**Plan Administrator:** Diane J. Walker

**Names of Counties served:** Greene, Lawrence, Monroe, Owen

**Number of registered attorneys in county:** \_\_\_\_\_ **in district:** 394  
Greene: 21  
Lawrence: 34  
Monroe: 323  
Owen: 16

**Percentage of volunteer attorneys who accepted a pro bono case in 2003 per registered attorneys in county:** none through IOLTA funding; statistics below are for non-IOLTA funding

Greene: 4.8%  
Lawrence: 11.8%  
Monroe: 18.6%  
Owen: 31.3%  
in district: 17.8%

**Percentage of volunteer attorneys who have not yet accepted a pro bono case in 2003 per registered attorneys in county:** \_\_\_\_\_

Greene: 19%  
Lawrence: 3%  
Monroe: 18%  
Owen: 25%

**Amount of grant received for 2004:** \$25,340

**Amount of grant (2003 & prior years) projected to be unused as of 12/31/04:** \$0

**Amount requested for 2005:** \$47,422.80

<b>PRO BONO DISTRICT NUMBER <u>10</u> LETTER OF REPRESENTATION</b>
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**The following representations**, made to the best of our knowledge and belief, are being provided to the Indiana Pro Bono Commission and Indiana Bar Foundation in anticipation of their review and evaluation of our funding request and our commitment and value to our Pro Bono District.

**Operation under Rule 6.5**

In submitting this application for funding, this district is representing itself as having a Pro Bono Plan, which is pursuant to Rule 6.5 of the Indiana Rules of Professional Conduct. The plan enables attorneys in our district to discharge their professional responsibilities to provide civil legal pro bono services ; improves the overall delivery of civil legal services to persons of limited means by facilitating the integration and coordination of services provided by pro bono organizations and other legal assistance organizations in our district; and ensures access to high quality and timely pro bono civil legal services for persons of limited means by (1) fostering the development of new civil legal pro bono programs where needed and (2) supporting and improving the quality of existing civil legal pro bono programs. The plan also fosters the growth of a public service culture within the our district which values civil legal pro bono publico service and promotes the ongoing development of financial and other resources for civil legal pro bono organizations.

We have adhered to Rule 6.5 (f) by having a district pro bono committee composed of:

- A. the judge designated by the Supreme Court to preside;
- B. to the extent feasible, one or more representatives from each voluntary bar association in the district, one representative from each pro bono and legal assistance provider in the district, and one representative from each law school in the district; and
- C. at least two (2) community-at-large representatives, one of whom shall be a present or past recipient of pro bono publico legal services.

We have determined the governance of our district pro bono committee as well as the terms of service of our members. Replacement and succession members are appointed by the judge designated by the Supreme Court.

Pursuant to Rule 6.5 (g) to ensure an active and effective district pro bono program, we:

- A. prepare in written form, on an annual basis, a district pro bono plan, including any county sub-plans if appropriate, after evaluating the needs of the district and making a determination of presently available pro bono services;
- B. select and employ a plan administrator to provide the necessary coordination and administrative support for the district pro bono committee;
- C. implement the district pro bono plan and monitor its results;
- D. submit an annual report to the Commission; and

- E. forward to the Pro Bono Commission for review and consideration any requests which were presented as formal proposals to be included in the district plan but were rejected by the district committee, provided the group asks for review by the Pro Bono Commission.

### **Commitment to Pro Bono Program Excellence**

We also understand that the outcomes achieved for clients, and the relationship of these outcomes to clients' most critical legal needs are ultimately the measure of success for a civil legal services program, whether a staffed or volunteer attorney program. We agree to strive for the following hallmarks which are characteristics enhancing a pro bono program's ability to succeed in providing effective services addressing clients' critical needs.

- 1. Participation by the local bar associations and attorneys.** The associations and attorneys believe the program is necessary and beneficial.
- 2. Centrality of client needs.** The mission of the program is to provide high quality free civil legal services to low-income persons through volunteer attorneys. Client needs drive the program, balanced by the nature and quantity of resources available.
- 3. Program priorities.** The program engages in a priority-setting process, which determines what types of problems the program will address. Resources are allocated to matters of greatest impact on the client and are susceptible to civil legal resolution. The program calls on civil legal providers and other programs serving low-income people to assist in this process.
- 4. Direct representation component.** The core of the program is direct representation in which volunteer attorneys engage in advocacy on behalf of low-income persons. Adjunct programs such as advice clinics, pro se clinics and paralegal assistance are dictated by client needs and support the core program.
- 5. Coordination with state and local civil legal providers and bar associations.** The programs work cooperatively with the local civil legal providers. The partnerships between the civil legal providers and the local bar association results in a variety of benefits including sharing of expertise, coordination of services, and creative solutions to problems faced by the client community.
- 6. Accountability.** The program has mechanisms for evaluating the quality of service it provides. It expects and obtains reporting from participating attorneys concerning the progress/outcome of referred cases. It has the capability to demonstrate compliance with requirements imposed by its funding source(s), and it has a grievance procedure for the internal resolution of disputes between attorneys and clients.
- 7. Continuity.** The program has a form of governance, which ensures the program will survive changes in bar leadership, and has operational guidelines, which enable the program to survive a change in staff.
- 8. Cost-effectiveness.** The program maximizes the level of high quality civil legal services it provides in relationship to the total amount of funding received.

**9. Minimization of barriers.** The program addresses in a deliberate manner linguistic, sensory, physical and cultural barriers to clients' ability to receive services from the program. The program does not create undue administrative barriers to client access.

**10. Understanding of ethical considerations.** The program operates in a way which is consistent with the Rules of Professional Conduct; client confidentiality is assured and conflicts of interest are avoided. The staff and volunteers are respectful of clients and sensitive to their needs.

**11. ABA Standards.** The program is designed to be as consistent with the ABA Standards for Programs Providing Civil Pro Bono Legal Services to Persons of Limited Means as possible.

No events, shortages or irregularities have occurred and no facts have been discovered which would make the financial statements provided to you materially inaccurate or misleading. To our knowledge there is nothing reflecting unfavorably upon the honesty or integrity of members of our organization. We have accounted for all known or anticipated operating revenue and expense in preparing our funding request.

We agree to provide human-interest stories promoting Pro Bono activities in a timely manner upon request of the Indiana Bar Foundation or Indiana Pro Bono Commission. We further agree to make ourselves available to meet with the Pro Bono Commission and/or the Indiana Bar Foundation to answer any questions or provide any material requested which serves as verification/source documentation for the submitted information.

**Explanation of items stricken from the above Letter of Representation:**

N/A

**It is understood that this Letter does not replace the Grant Agreement or other documents required by the Indiana Bar Foundation or Indiana Pro Bono Commission.**

**Signatures:**

\_\_\_\_\_  
**Judicial Appointee Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Plan Administrator Signature**

\_\_\_\_\_  
**Date**

## 2005 PLAN SUMMARY

1. Please write a brief summary of the 2005 grant request. Please include information regarding your district's planned activities. The grant request should cover needs to be addressed, methods, target audience, anticipated outcomes, and how past difficulties will be addressed.

**A) Planned activities and Methods:** District 10's focus will be maintaining its newly opened legal services office, increasing the number of applicants helped and attorneys recruited for **direct representation**. District 10 will conduct CLEs to educate and mobilize the local bar on behalf of our clients. District 10 will also start **adjunct programs to support the core program**, namely a "Pro Se Desk" and a program to place law students with volunteer attorneys, in accordance with the Pro Bono Commission's law student pro bono and mentoring initiative.

**1) Maintain new legal services office:** On June 1, 2004, District 10 opened an office in Bloomington with a toll-free number in order to **minimize client barriers**. **Cost-effectiveness is maximized** because aside from Ms. Walker, all personnel are law or pre-law student volunteers, and rent, utilities, furniture, technology and most supplies have been donated. As of this writing, 250 pamphlets advertising District 10's services have been distributed to local agencies and court clerks' offices. Client referrals have been made by local judges, the Indiana Coalition Against Domestic Violence, Bloomington's Indiana Legal Services, Inc. (ILSI) office, and the IU Law School Community Legal Clinic (CLC), among others, ensuring **coordination with state and local civil legal providers and bar associations**. Publicity has yielded inquiries from an average of four potential clients a day, a number which **is expected to** increase. Indicators after three weeks of operation show that **the local bar associations and attorneys believe the program is necessary and beneficial** because a) referrals have already been made by the local bar association; b) five attorneys have accepted new cases; c) three attorneys and two judges have made or pledged in-kind donations and d) the Monroe County Prosecutor's Office has offered to donate money.

With regard to District 10's **methods**, Ms. Walker will train over 20 additional volunteers to screen not only for income eligibility and pro bono representation but to identify other applicant problems and make referrals to other resources, so that applicants can help themselves by accessing all available benefits and social services in the community. Every effort will be made to help applicants receive some service even if their case isn't within District 10's **priority** areas. Applicants may receive advice or brief services from the plan administrator, informational literature or referral to other legal services providers. Page 9 contains more information about **methods** and the cases which are accepted.

**2) Conduct CLEs:** District 10 plans to hold two CLE's a year to recruit attorneys to take cases in exchange for free CLE credit. IU Bloomington law professors have offered to be presenters for CLE, which will include ethics credit. This will also ensure that District 10 and its volunteer attorneys **operate in a way which is consistent with the Rules of Professional Conduct**.

**3) Start adjunct programs:** The planned "Pro Se Desk" will be modeled upon a similar monthly effort in Putnam County in which attorneys provide information to and troubleshoot for pro se litigants. **This program will support the core program of direct representation**, and will be designed principally to meet additional **client needs**. District 10 will also **support its core program** by participating in the Indiana Pro Bono Commission's law student pro bono and mentoring initiative.

**B) Needs to be addressed and target audience:** As discussed further on page 9, District 10 has higher-than-usual costs of living and pockets of rural poverty, making it difficult for lower income people to get legal help. Legal help for the poor has become scarcer in the last two years as the Bloomington ILSI office has lost three attorneys, two fulltime paralegals and its entire Americorps program, including personnel who did elder, family and benefits law. District 10 **shares expertise** with ILSI because its plan administrator is one of the attorneys who worked for ILSI and enjoys an excellent relationship with that office. District 10 has taken over ILSI-Bloomington pro bono referral work, and is **coordinating services** with ILSI to fill client needs in the areas noted above.

**C) Anticipated outcomes and past difficulties:** District 10 is home to ILSI-Bloomington, IU-Bloomington School of Law, and a large number of attorneys registered in the four-county area (although this number includes numerous professors, university administrators, and others who do not practice regularly). Attorneys have provided extensive, although frequently unreported, pro bono work. However, as shown more extensively on page 9, District 10 has encountered problems which are now being resolved through the efforts of its judicial chair and pro bono coordinator. The organization has been incorporated to **ensure continuity of governance** and has a motivated board of directors. With the plans outlined above, District 10 aims for pro bono participation by over 20 % of the active attorneys registered in the area.

## 2003 REPORT OF VOLUNTEER LAWYER CASES IN DISTRICT 10

Please attach additional pages for each pro bono provider that receives IOLTA funding, whether directly or indirectly, in your district. See the sample additional pro bono provider page 6A. Please list each attorney only once in the volunteer lawyer column but complete one line for each pro bono case for that attorney.

### Definitions:

Case: A legal matter referred to and accepted by a pro bono attorney volunteer.

Volunteer Lawyer: An attorney who has rendered pro bono service to at least one low-income client during the year or accepted a pro bono referral from the identified program. This does not include attorneys who are on the list of pro bono volunteers but who have never taken a case. The case numbers do not include cases screened, only cases actually referred to a pro bono attorney.

Case Type: Please use the abbreviations listed in Indiana Supreme Court Administrative Rule 8(B)(3)

**During calendar year 2003, pro bono representation was not secured through IOLTA funding.** While the District 10 Pro Bono Project was being developed (see page 9 below for special circumstances), private attorneys provided pro bono representation to indigent and low income individuals through the following means:

- 1) ILSI referral system, which reported 14 attorneys staffing 14 cases closed during 2003, with an additional 26 attorneys staffing 26 cases that remained open at year end, for a total of 40 attorneys working on pro bono cases during the year.
- 2) Protective Order Project ("POP") at the Indiana University School of Law, which reported that 12 attorneys staffed 12 cases during the year.
- 3) Monroe County Court Appointed Special Advocate Program ("CASA Program"), which reported that 19 attorneys staffed 19 cases during 2003.
- 4) Indiana University School of Law Mediation Project, which reported that 7 attorneys provided mediation services, co-mediation services and/or supervision of student mediators for mediations involving indigent or low income individuals.
- 5) Various judges and magistrates in District 10 counties referred pro bono cases to private attorneys to indigent and low income individuals (no statistics maintained).

## **2003 REPORT OF VOLUNTEER LAWYER LIMITED INFORMATION ACTIVITY IN DISTRICT 10**

This limited legal information chart can include activities such as pro se clinics and call-in or walk-in informational services.

Please attach additional pages for each pro bono provider that receives IOLTA funding, whether directly or indirectly, in your district. See the sample additional pro bono provider page 7A. Please list each attorney only once in the volunteer lawyer column but complete one line for each type of legal information activity for that attorney.

**Name of Pro Bono Provider** (includes legal service provider, court, plan administrator, bar association, and other organizations): **See pages 6 and 9**

## 2003 REPORT

**Please list your District's 2003 activities--including committee meetings, training, attorney recognition, marketing and promotion--in chronological order.**

<u>Date</u>	<u>Activity</u>
1/10/03	Justice Shepard announces appointment of Judge Michael A. Robbins
1/10-10/10/03	Judge Robbins had regular and repeated meetings with Judge Taliaferro to discuss pro bono issues and with Judge Mann to transfer funds, be updated, receive rolls of attorneys and survey forms, and retrieve all of the Project materials from the former part-time plan administrator. Judge Robbins also met with Dean Lauren Robel, IU Bloomington Law School, who recommended two volunteer IU law students to assist Judge Robbins in organizing prior materials and putting computer data in a usable form. This reorganization took many months, during which Judge Robbins searched for a plan administrator. When that effort did not originally result in locating a viable candidate, the Project went forward using law students attempting to operate out of the law school, with a student volunteer, George Langendorf, working on the 2003 report/plan/grant request. As Judge Robbins received more information and got more experience, it became apparent that an attorney plan administrator was necessary and that space at the law school would not be sufficient for the needs of the project. At that point, Judge Robbins again began a search for a plan administrator to implement District 10's pro bono plans.
10/9/03	Judge Robbins interviewed Ms. Walker for plan administrator, and conducted follow-up interviews with her references.
10/10/03	Judge Robbins made a job offer to Ms. Walker, contingent on approval of committee members.
10/15/03	Committee members informed of proposed plan administrator and offered opportunity to register objections; there were no objections.
10/17/03	Ms. Walker met with Judge Mann
11/17/03	Ms. Walker started working as plan administrator.
11/18/03	Meeting between Ms. Walker and Judge Robbins to discuss work plan.
11/26/03	Office furniture secured by donation from ILSI-Bloomington
1/8/04	Budget, problem statement and timeline for District 10's 2004 accomplishments submitted to Ms. Applegate from the Indiana Pro Bono Commission
1/9/04	Meeting with Ms. Walker, Judge Robbins and Ms. Applegate to discuss pro bono issues in district
1/22/04	Meeting between Ms. Walker and Judge Robbins
2/16/04	Meeting between Ms. Walker and Judge Robbins
2/24/04	Meeting between Ms. Walker and Judge Robbins
3/1/04	Secured donation of office space and utilities
3/4/04	Additional committee members recruited to round out previous committee
3/10/04	Meeting between Ms. Walker and Judge Robbins
3/16/04	District 10 Pro Bono Project, Inc. incorporated as Indiana not-for-profit corporation.
4/5/04	Additional office equipment and large amount of office supplies secured from other donors
4/9/04	Meeting between Ms. Walker and Judge Robbins
5/19/04	Meeting between Ms. Walker and Judge Robbins
5/25/04	Meeting between Ms. Walker and Judge Robbins
5/27/04	First meeting held of the District 10 Pro Bono Project, Inc. Board of Directors. Bylaws adopted, officers elected and numerous corporate resolutions made.
6/1/04	District 10 Pro Bono Project, Inc. opens its office at 706A N. Walnut St. in Bloomington.
6/2/04	Ms. Walker speaks at Monroe County Bar Association meeting, brochures distributed.
6/3/04	Brochures distributed to Monroe County Court Services.
6/9/04	Meeting with Ms. Walker, Judge Robbins, Judge Taliaferro and Ms. Applegate
6/11/04	Volunteers recruited to serve as office help.
6/14/04	Brochures mailed to Owen, Lawrence, and Greene County clerks' offices, Area 10 Agency on Aging and Middleway House



## 2003 REPORT

**Please provide a short summary of how the provision of pro bono service is coordinated in your district, including the intake process, the relationships of pro bono providers in the district, how referrals are made, and how reporting is done.**

**The intake process:** District 10 prioritizes cases which will have the greatest impact on the client, namely cases which: preserve shelter; maintain economic stability; ensure safety and well-being, protect rights to health care, education and self-determination; and ensure fairness/access to legal proceedings. In setting priorities, District 10 considered the work done by other **civil legal providers and other programs serving low-income people**, and supplements the services of ILSI, law school clinics and other resources. If the applicant's case falls within a **priority** area, the client is interviewed extensively by District 10 volunteers. Before placement, Judge Robbins reviews the case to ensure that it is **susceptible to civil legal resolution** and is indeed a **priority** case.

**Referrals** are done by the plan administrator, who knows most of the local bar. If there is difficulty in placing a case, a member of the Volunteer Recruitment Committee of District 10's **Board of Directors** makes **referrals**. This Volunteer Recruitment Committee includes five judges from all four counties. These judges are committed to not only making **referrals**, but writing thank-you letters to each volunteer attorney. District 10 also works with the law school's placement office to capitalize on recent bar admittees who are still living in Bloomington. District 10 also has taken over the **referral** work done previously by ILSI-Bloomington.

District 10 **monitors** each case on its own calendar in order to track its progress, and volunteer attorneys are also encouraged to call District 10 during the case if they need forms, research or mentoring. **Reporting** is accomplished by each volunteer attorney filling out a "case completion report." District 10 also has a grievance procedure in place to resolve attorney-client disputes. These methods **maximize accountability**.

**District 10 enjoys excellent relationships with the principal pro bono providers in the area**, namely ILSI and law school clinics. All share board members, referrals, forms and methods, and the consensus is that "we're all on the same team." **District 10 will work with other local agencies** to do outreach to **clients who have barriers due to physical or sensory limitations**, and is recruiting bilingual intake volunteers **to minimize cultural and linguistic barriers** to District 10's increasing Hispanic population.

**Please describe any special circumstances, including difficulties encountered, affecting your District's 2003 implementation of its plan.** District 10 lost its plan administrator and judicial chair when both resigned in October 2002. The present chair, Judge Michael A. Robbins, was appointed in January 2003. Judge Robbins was new to the bench, and his court, Lawrence Superior 1, was in disarray because the prior judge left in August 2002 after charges of judicial misconduct. Judge Robbins was also starting from scratch with District 10. District 10's plan for 2003, which called for matching law students with attorneys, had met with **unexpected disfavor, resulting in a merit-based allocation** of **only** \$11,000 plus the District's poverty allotment. The poverty percentage for District 10 in 2003 had been assessed by the Pro Bono Commission at 5.4%, which put District 10 eighth in the state. However, District 10 contains some of Indiana's poorest counties and highest living costs.\* **Judge Robbins was concerned that the poverty allotment of \$9,720 plus \$11,000 was not sufficient to hire** a plan administrator during 2003. **As** he used volunteer law students to the extent possible, however, it became apparent that a paid attorney administrator was **essential** to screen for meritorious cases, supervise non-lawyer volunteers, provide services to clients, deal with volunteer attorneys on an equal footing, and contribute to the sustainability of the organization. Judge Robbins thus opted to combine District 10's 2003 and 2004 appropriations **(received in January 2004)**, and in November 2003, hired Ms. Walker. Since November 2003, District 10 has incorporated and is seeking 501(c)(3) status. It has opened a legal services office run with volunteers and donations, engaged in publicity and is serving a steadily increasing number of applicants. Judge Robbins has also done something unique in recruiting at least one judge from **each county** to serve on District 10's **Board of Directors**. These judges are valuable assets in providing client referrals, recruiting and recognizing attorney work, and building support among the bench and bar for District 10. ILSI and IU Law have also been unusually generous with help and expertise, and **solidly support District 10's efforts**. In short, District 10 has made significant strides in bringing **back to life** an almost moribund project.

\* STATs Indiana, using numbers from the US Census Bureau, ranked Owen County 89<sup>th</sup> among 92 counties in 2001 per capita personal income, Greene 83<sup>rd</sup>, and Lawrence 70<sup>th</sup>. Monroe County ranked 35<sup>th</sup> in personal income, but the Indiana Coalition of Housing and Homeless Issues (ICCHI), in its 2002 "Self Sufficiency Standard" report, found that Monroe County

was one of the top four most expensive counties in the state in living costs such as housing, child care, medical expenses, etc.

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**BUDGETS FOR 2003, 2004 AND 2005 FOR IOLTA FUNDS ONLY**

<b>Cost Category</b>	<b>2003 actual expendi- tures</b>	<b>2003 Budget</b>	<b>2004 actual expendi- tures</b>	<b>2004 Budget</b>	<b>2005 Budget</b>
<b>A. Personnel Costs</b>					
1. Plan Administrator	4,500	4,500	18,000	36,000	36,000
2. Paralegals	0	0	0	0	0
3. Others	0		0	0	0
4. Employee benefits	0	0	0	0	0
a. Insurance	0	0	0	0	0
b. Retirement plans	0	0	0	0	0
c. Other					
<b>5. Total Personnel Costs</b>	<b>4,500</b>	<b>4,500</b>	<b>18,000</b>	<b>36,000</b>	<b>36,000</b>
<b>B. Non-Personnel Costs</b>					
1. Occupancy	0	0	0	1,021	2,500
2. Equipment rental	0	0	0	0	0
3. Office supplies	217.50	217.50	97.81	500	1,000*
4. Telephone	0	0	0	1,631	1,981**
5. Travel	0	0	84.32	480	480
6. Training	0	0	306.98	0	0
7. Library	0	0	0	0	0
8. Malpractice Insurance	0	0	1,552.88	2,000	1,900
8a. Premises insurance			a. 200	a. 240	a. 200
9. Dues and fees	0	0			
9a. Indiana State Bar				a. 230	a. 230
b. Supreme Court				b. 105	b. 105
c. Notary Public fees				c.67	c.0
d. 501©(3) filing fee				d.500	d.0
e. Art. of Inc. filing fee			e. 30	e.30	e.0
10. Audit	0	0	0	2,500	0
11. Contingent reserve	0	0	0	0	0
12. Litigation re-	0	0	0	0	0

serve					
13. Marketing and promotion 13 a. brochures b. letterhead & envelopes	0	0	a.50.62 b. 137.80	a. 100 b. 80	a. 16 b. 154.50**
14. Attorney Recognition	0	0	0	51.80	51.80
15. Litigation Expenses (includes expert fees)	0	0	0	1,000	1,500**
16. Property Acquisition 16a. Computers b. Printer	0	0	21.19 (phone)	a.1057.88 b. 200	0
17. Contract Services	0	0	0	0	0
18. Grants to other pro bono providers	0	0	0	0	0
19. Other 19 a. Postage and mailbox b. Meals at Equal Justice Conference c. Storage and moving	c. 180	c. 180	a. 11.70 b.0 c.352	a. 1,027 b. 90 c. 0	a.1,304.50** b.0 c.0
<b>20. Total Non-Personnel Costs</b>	397.50	397.50	2,481.60	12,910.68	11,422.80
<b>C. Total Expenditures</b>	4,897.50	4,897.50	20,481.60	48,910.68	47,422.80

**IOLTA funds received 2003: \$20,720 IOLTA funds received 2004: \$ 25,340**

\*District 10 received a substantial start-up donation of office supplies from a source that cannot be tapped again, and thus is expecting its office supplies budget next year to double.

\*\* Budget items such as telephone long distance, postage, letterhead, litigation and expenses and the like are subject to how many clients we serve. District 10 calculated these budgetary items by figuring that client traffic will increase by approximately 50% in 2005.

## **Budget Narrative**

Please provide descriptions of the following line items in the foregoing budget chart, by item number, in the space provided.

Lines (A)(1), (2), (3) Please indicate the number of hours per week for each personnel position and rate of pay.

(A)(1) The plan administrator is a lawyer working as an independent contractor at the rate of \$36,000 per year. Her contract specifies she "select her own hours of activity consistent with the needs of District 10, and the conventional business hours of a full-time work week." In practice, she works between 37 and 55 hours per week.

Line (B)(1) Please describe the occupancy cost in terms of square footage, utilities or other amenities and indicate whether the occupancy cost is above or below the market rate for that space.

(B)(1) Office space is approximately 250 square feet. Utilities are included with the rent. The landlord, Pinnacle Properties, donated rent for the first year, from March 2004 to February 2005, but will begin charging market rate of \$250 per month beginning March 2005. The free rent for 2004 is obviously below market rate, and considering that two months' rent will be donated in 2005, this puts the total rent for the year of \$2,500 below the year's market rate of \$3,000.

<b>ANNUAL TIMETABLE FOR SUBMISSION OF FORMS AND CHECKS:</b>
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January 1:	Checks distributed
July 1:	Annual report, plan and grant application due to IPBC
November:	Notification of awards
<b>December 1:</b>	<b>IBF grant agreement due and revised budget due</b>